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Germany

Dairy and Products

Annual

2000

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Report Highlights:
Milk output is stable at 28.4 million MT in CY2000. German cheese production is likely to rise to 1,046,000 MT up from 1,006,000 MT in CY1999. This upswing may be triggered by renewed exports to Russia after the sharp decline in CY1999. In contrast, production of butter and NFDM are expected to decline. No significant changes are reported for whole milk powder, casein and whey powder.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

German production of milk is estimated at 28.4 million MT in CY 2000. After the drop in cheese production in 1999, production may increase significantly in 2000, especially production of cheeses for the Russian export market as well as for Italy, France and the Netherlands. Consumption of cheese may increase by one percent.

Production and consumption of butter are expected to decline slightly.

Production of Nonfat Dry Milk Powder (NFDM) is expected to decline sharply in 2000 as less skim milk is available for the production of NFDM because of a stable milk supply and increase in production of cheeses and fresh milk products.

No significant changes are expected for the whole milk powder, casein and whey powder markets.

The dairy elements of Agenda 2000 will kick in at different stages beginning as late as marketing year 2005/06 (MYApril/March) for most parts. Consequently, Germany will not be affected for some time.

In contrast, Germany changed its quota regime with the begin of the MY2000/01 (April/March) (April 1, 2000) and put in place a commodity market system, where milk quotas are traded periodically at various commodity exchanges following market signals (through an offer and bid process at pre-announced prices).

Regarding the upcoming WTO negotiations, Germany follows a very conservative approach and aims at maintaining strong domestic support and protection of own internal markets.

The German dairy industry will likely benefit from an enlargement of the European Union (EU). Although market experts and scientists are still undecided whether the inclusion of up to twelve eastern countries to the EU will improve the situation of the German dairy industry, it seems to be more likely that the accession countries' import potential will outweigh their export potential to Germany.

Section I: Situation and Outlook

The German Dairy Market in CY1999

German production of milk amounted to 28.4 million MT in CY1999, similar to CY1998. Dairy farmers got a better grip on managing milk output to avoid high penalties in case of production in excess of quota. Imports of milk rose from 469,000 MT in 1998 to 524,000 MT in 1999. Imports comprise significant quantities of across the border sales of retail packages (containers of up to two liters). Exports to Belgium and the Netherlands declined.

Production of cheese (excluding curds and fresh cheeses) declined slightly from 1,008,000 MT in 1998 to 1,006,000 MT in 1999. Especially production of natural and fermented cheeses declined noticeably whereas production of fresh cheeses dropped only slightly; and production of processed cheeses rose marginally. This unexpected overall decline, broke a long trend of increasing cheese production, and came in response to a drop in export demand from Russia. German dairies stopped production of cheese varieties for the Russian market. Consumption increased by one percent from 1,032,000 MT in 1998 to 1,042,000 MT in 1999.

Both exports and imports declined as Russia bought less cheese in 1999, and Germany demanded less cheese from its major suppliers in the Netherlands and France.

Production of butter was stable at 427,000 MT in 1999. Post had expected a decline. However, due to lower cheese production, milk fat was instead converted to the production of butter, and export demand from Russia remained unexpectedly strong.

Consumption declined by 7,000 MT in 1999 to 548,000 MT. Prices weakened considerably in 1999, and for the first time in six years butter was sold into intervention. Prices recovered slightly at the end of 1999.

Production of Nonfat Dry Milk Powder (NFDM) increased to 331,000 MT in 1999 (after 326,000 MT in 1998) as more skim milk was available for the production of NFDM because of a stable milk supply and decline in production of cheese.

Total consumption dropped to 84,000 MT in 1999 after 89,000 MT in 1998. Several factors contributed to the continuous decline in consumption: less NFDM is being used in milk replacers, so-called zero milk replacers (not containing NFDM) gained market share, and demand for milk replacers declined due to a reduction in calf numbers (as part of the early slaughter scheme to reduce beef/veal production).

NFDM exports rose sharply to 300,000 MT in 1999, compared with the unusually low level of 272,000 MT in 1998, mainly to the Netherlands and Italy, but also third countries because of higher demand for NFDM in feed. Unexpectedly, Russia became a major importer of NFDM in 1999. Therefore, despite the reduction in domestic consumption, the market conditions improved considerably and German intervention stocks declined. Imports were stable.

Production of Whole Milk Powder declined slightly in 1999. Consumption rose moderately stable. Production and consumption of casein are stable. Production of whey powder declined from 203,000 MT in 1998 to 196,000 MT in 1999. Consumption remained stable.

The German Dairy Market in CY2000

German production of milk in CY2000 may be unchanged from 1999 at 28.4 million MT. Imports and exports of milk are difficult to estimate but most likely may remain at 1999 levels. Consequently, no major shifts in general milk processing are expected for 2000.

Production of cheese (excluding curds and fresh cheeses) may increase significantly from 1,006,000 MT in 1999 to 1,046,000 MT in 2000, mainly due to upswings in the production of natural and fermented cheeses. German dairies are responding to the strong export demand from Russia but also from Italy, France and the Netherlands and are stepping up production for these markets. The best selling cheese varieties are Edam, Gouda, Emmental, Chester, Tilsit and Butter Cheese (hard, semi-hard, soft and sliced cheeses). Consumption may increase by one percent form 1,042,000 MT in 1999 to 1,053,000 MT in 2000. Imports are expected to be stable.

Production of butter is expected to decline from 427,000 MT in 1999 to 410,000 MT in 2000, the lowest level since reunification of Germany in 1990. This drop can be attributed to the upswing in use of milk fat in cheese production, the rise in fat content of fresh milk products and cheeses (less production of "light"/low fat varieties) and the replacement of butter by cream in food production.

Consumption may decline marginally from 592,000 MT in 1999 to 581,000 MT in 2000. Imports and exports are likely to remain stable.

Production of Nonfat Dry Milk Powder (NFDM) is expected to decline sharply to 300,000 MT in 2000 (after 331,000 MT in 1999). Less skim milk is available for the production of NFDM because of a stable milk supply and at the same time an increase in production of cheeses and fresh milk products.

Total consumption may be stable at 85,000 MT in 2000 after 84,000 MT in 1999. Several factors contribute to the continuous low level in consumption: less NFDM is being used in milk replacers, so-called zero milk replacers (not containing NFDM) have gained market share, and demand for milk replacers has declined due to a reduction in calf numbers (as part of the early slaughter scheme to reduce beef/veal production).

NFDM imports and exports may remain stable.

Production of Whole Milk Powder is expected to rise slightly in 2000. Consumption may be stable. Production and consumption of casein are stable, whey powder production may rise with the upswing in cheese production.

Agenda 2000/European Union (EU) Agricultural Policy

For the dairy sector, EU-reform of the Common Agricultural Policy (CAP), the so-called Agenda 2000, will kick in at different stages:

- Beginning with the milk marketing year MY2000/01 (April/March), milk quotas for Greece, Spain, Ireland, Italy and

North-Ireland will be increased by 887,480 MT, and again in MY2001/02 by 502,292 MT.

- Beginning with MY2005/06, milk quotas for all other EU member states will be increased in three equal annual instalments by 1.5 percent or a total increase of 1.44 million MT.

- Intervention prices for butter and nonfat milk powder will be cut by 15 percent in three stages of five percent between MY2005/06 and MY2007/08.

- To compensate for the reductions in intervention prices, farmers will receive fixed amounts of subsidy per MT of milk quota individually held in MY1999/2000, or i 5.75/MT in CY2005, i 11.49/MT in CY2006 and i 17.24/MT in CY2007 and following years. Additional quotas obtained as part of the Agenda 2000 will not be compensated.

- Member states are authorized to pay out additional national compensatory amounts to milk producers which may be used either as a supplement to the above mentioned compensatory amounts or as area premiums. These additional amounts are capped and must come from national and not EU budgets.

- EU member states are authorized to gradually ease the requirement on the quota regime. This includes the free trade of quota and the possibility to withdraw quota to the benefit of a national milk pool from which quota may be distributed among producers.

- As a political goal, the milk quota system may expire after CY2006. The whole reform is scheduled for revision in CY2003.

- As part of the reform of the beef market organization, beginning CY2000, dairy farmers will receive a slaughter premium of i 80 per dairy cows slaughtered to compensate for the reduced value of dairy cows.

- Germany will see its milk quota increased by 1.5 percent or 418,000 MT in three equal annual instalments between MY2005/06 and MY2007/08, up from 27,864,800 MT to 28,282,800 MT. For Germany, additional national compensation amounts are capped at i 216.0 million in CY2007.

German Reform of the Quota System

The German Government moved quickly after the release of Agenda 2000 in reforming the currently inflexible quota system which in the past accrued considerable costs to producers, and put in place a commodity market system on April 1, 2000. Starting October 1, 2000, milk quota will be traded periodically at various regional commodity exchanges following market signals (through an offer and bid process at pre-announced prices).

The main objectives are to keep production rights in the hands of active milk producers (regardless of whether they currently own or rent/lease quota) and to reduce the considerable transaction costs which occurred when quotas were traded. This system may also prepare Germany for a gradual phase-out of the quota system.

Market experts do not expect that these objectives will be achieved soon. Many dairy producers and owners of quota (active or retired) entered in or renewed long term rent contracts or sold/bought quota (at sometimes outrageously high prices) in anticipation of the new auction system which they perceived as too unpredictable in its consequences for prices and quantities available. Thus considerable production rights may stay with inactive quota owners for several years. It also means that quantities of quotas offered may be limited in the first years because of those long term commitments, and in consequence small quota quantities may be traded at the auctions at high prices.

Experts generally estimate a strong demand for quota in the upcoming years for several reasons: First, all dairy farmers in Germany operate below full (100 percent) capacity, requiring an increase in herd sizes and output. Second, milk output is likely to grow at a steady one to five percent per year in response to technology developments. Third, newcomers will want to purchase quota.

However, supply is likely to be small: First, in agriculture, closing down of operations is unpopular. Second, it may socially or legally be impossible to close down the operation (personal commitments, contracts for public funds, etc.). Third, farm managers may often not respond to economic factors (the return on investment in dairy versus alternative investments is often not a decision making factor).

As a result, most likely, there will be an excess of demand over supply for several years. Recent questionnaires showed that theoretical bid prices of potential buyers and sellers may be around 0.40 and 1.50 DM per liter of milk quota.

Following are the main elements of the proposal:

- Milk quota transactions are independent from the land.
- Milk quota can only be sold and only to active producers.
- There is no rent or lease of quota.
- Sales of milk quota take place at three fixed auction days (April 1, July 1, October 30) in an offer and bid process according to the “Danish Model”: The clearing price is the price where the added up offers equal added up demand.
- Quotas may only be auctioned in certain areas (quotas remain in region). There is no nationwide auctioning of quota.
- A national milk reserve will be established.
- A share (five percent) of quota put for sale is automatically forfeited to the national reserve.
- Traded quota may only be offered again after two years of use.
- If high selling prices prevent a first sale, second and third bids are penalized, and parts of the quota are withdrawn to the benefit of the national reserve. (In case the offer price exceeds the clearing price by 20 percent, five percent of the quota will be forfeited to the national reserve in the case of a following successful sal; in case of repeated excess pricing, ten percent will be forfeited. It is hoped that this regulation will keep prices low.)
- Current rent or lease contracts are protected.

In addition, preliminary milk delivery rights in eastern Germany will be converted into quota rights.

The basic rules governing the quota system will remain intact, e.g., superlevies in case of production in excess of quota, quota rights to farmers, delivery obligations for farmers to certain dairies, etc.

German Objectives for WTO negotiations in the Dairy Sector

Economically, the dairy sector is the second most important generator of farm income in Germany, after the livestock and meat sectors. In some areas it is the most important. It is also at the core of many agribusiness activities. In addition, significant non-economic values are attributed to the sector, of which the most important are the landscaping aspects (keep land open; use otherwise unusable agricultural land; offer scenic infrastructure for tourism) and the employment aspect in areas with structural employment problems. Therefore, people see a need for managing this sector, not only on a regional or national level, but internationally, to ward off ruinous production and trading practices. Managing in this sense does not exclude a slight move towards liberalization; however, it emphasizes the need for a) decentralized milk production, b) income support for the dairy sector, c) self-sufficiency in milk production and d) management of trade flows.

Consequently, following are the main GermanWTO objectives in the dairy sector:

- Extend the peace clause until CY2006 or 2008 to allow for an adjustment in dairy policies if needed.
- Get WTO authorization for the anticipated direct payments for dairy farmers as part of Agenda 2000.
- Allow for discriminating domestic support for environmental and social reasons.
- Fend off drastic reductions in export subsidies and increases in market access for dairy products.
- Press for market access in export markets.

EU-Enlargement

The EU will soon start official accession negotiations with up to twelve eastern European states (Bulgaria, Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia). Market experts and scientists in Germany are still undecided about the possible repercussions on the German dairy market. Some fear that accession will increase imports of dairy products in particular into Germany with consequent strong pressure on prices. Others argue that the import potential of these countries is greater than their export potential and that the increases in consumption due to the big population base and the increase in per capita income will overcompensate for eventual exports to Germany.

Post leans more toward the latter position. On the one hand, despite low per capita incomes, increases in the consumption of high quality "western" products seem to be likely, even if only by a small affluent part of the population. On the other hand, both the agricultural and the food sector of ten of the accession states (all of the above minus Cyprus and Malta) are still in disarray. With the exception of Rumania and Slovenia, gross agricultural product is still below the level in 1989 and may not exceed this level for several years to come. In many eastern European countries, production capacities in the dairy, meat and flour industries are underutilized (40 to 60 percent use ratio) due to outdated and unreliable production technology. Often product quality and diversity do not meet Western standards, so that products cannot be sold on western markets.

The German Compound Feed Industry

The German Compound Feed Industry was comprised of 510 companies (companies with an annual production capacity of more than 250 MT) in CY1999. In marketing year MY1998/99 (July/June), the industry produced 19.04 million MT of mixed (compound) feed with a turnover of 7.8 billion DM (approximately US$3.9 billion). German farmers spent 9.3 billion DM (US$ 4.6) on animal feed. Consequently, the compound feed industry accounted for 84 percent of total commercial feed expenditures in Germany.

The compound feed industry in Germany is characterized by commercial production. Integrated production is small as only marginal quantities of compound feed are channeled into affiliated livestock operations. However, a significant quantity of feed is mixed on the farm, by farmers, to be used in their livestock operations (see Table 4). These, often larger, farm operations use their own harvested grain and purchase premixtures of minerals and additional feed and feed concentrates to mix their own feed formulations.

The industry is haunted by overcapacity at 15 to 20 percent. Consequently, the compound feed industry is constantly consolidating (see Table 8). Since MY1992/93, the total number of companies declined by 145 and average annual production per company rose from 29,889 MT to 37,333 MT or 25 percent. Bigger companies, although small in number, account for the bulk of production. For example, in 1991/92 companies with an annual production of over 200,000 MT accounted for less than 30 percent of total production. In 1998/99 this share rose to 36 percent. Small companies tend to specialize whereas big market players supply the full range of mixed feeds for major animal varieties.

Naturally, the upside of overcapacity is the industry's ability to quickly adjust to additional demand, e.g., the increase in hog numbers in 1999 was easily met by an increase in compound feed production (see Table 4).

Despite fewer feed producers, there is fierce competition within the industry for clients. Overcapacity is mainly due to lower livestock numbers (especially cattle and hog); more mixed feed on the farm, and slow adjustment by a traditionally small scale industry.

The industry depends heavily on imports of pulses, soybean meal/soybeans, palm kernel meal, and corn gluten feed. It also imports significant quantities of fish meal, also from the United States. In addition to bulk commodities mainly soybeans, corn and corn gluten feed, the United States may provide premixtures and specialty products, such as vitamins and mineral concentrates or specialize in niche markets (e.g., pet food).

Section II: Tables

The following section includes PSD's, price tables, trade matrices and additional tables.

Note: U.S. dollar/German mark exchange rates have been as follows (according to *Handelsblatt*):

1991: $1 = DM 1.66;	1996: $1 = DM 1.50;
1992: $1 = DM 1.52;	1997: $1 = DM 1.70;
1993: $1 = DM 1.65;	1998: $1 = DM 1.76,
1994: $1 = DM 1.61;	1999: $1 = DM 1.66.
1995: $1 = DM 1.43;	

Further exchange rates are for: Euro (i)/German mark: i 1 = DM 1.95583,
i /U.S. dollar: i 1 = $ 0.9012 (8/29/2000).

Table 1: PSD for Fluid Milk (in 1,000 MT, 1,000 head), average monthly Import Prices (in US$ per MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Cows In Milk	5,833	4,833	4,644	4,710	0	4,600
Cows Milk Production	28,400	28,400	28,400	28,400	0	28,400
Other Milk Production	0	0	0	0	0	0
TOTAL Production	28,400	28,400	28,400	28,400	0	28,400
Intra EC Imports	524	524	500	500	0	500
Other Imports	0	0	0	0	0	0
TOTAL Imports	524	524	500	500	0	500
TOTAL SUPPLY	28,924	28,924	28,900	28,900	0	28,900
Intra EC Exports	2,104	2,104	2,100	2,100	0	2,100
Other Exports	12	12	20	20	0	20
TOTAL Exports	2,116	2,116	2,120	2,120	0	2,120
Fluid Use Dom. Consum.	5,350	5,350	5,300	5,300	0	5,300
Factory Use Consum.	20,098	20,098	20,120	20,120	0	20,120
Feed Use Dom. Consum.	1,360	1,360	1,360	1,360	0	1,360
TOTAL Dom. Consumption	26,808	26,808	26,780	26,780	0	26,780
TOTAL DISTRIBUTION	28,924	28,924	28,900	28,900	0	28,900
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	351	366	4.3%		Jul	322	288	-10.6%
Feb	344	336	-2.3%		Aug	338	311	-8.0%
Mar	333	371	11.4%		Sep	327	316	-3.4%
Apr	323	295	-8.7%		Oct	397	360	-9.3%
May	330	293	-11.2%		Nov	397	344	-13.4%
Jun	316	307	-2.8%		Dec	385	337	-12.5%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 2: German Import and Export of Fluid Milk (in MT)

Imports for	1999		2000		2001
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
Austria	225,895	Austria	202,000	Austria	202,000
Belgium	99,560	Belgium	100,000	Belgium	100,000
Luxemburg	79,964	Luxemburg	80,000	Luxemburg	80,000
France	61,896	France	61,000	France	61,000
Netherlands	48,550	Netherlands	49,000	Netherlands	49,000
Sweden	5,409	Sweden	5,000	Sweden	5,000
Denmark	2,024	Denmark	2,000	Denmark	2,000
Great Britain	332	Great Britain	400	Great Britain	400
Italy	153	Italy	200	Italy	200
Greece	72	Greece	100	Greece	100
Total for Others	523,855	Total for Others	499,700	Total for Others	499,700
Others not listed	1	Others not listed	17	Others not listed	17
Grand Total	523,856	Grand Total	499,717	Grand Total	499,717

Exports for	1999		2000		2001
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
Italy	1,323,998	Italy	1,323,000	Italy	1,323,000
Belgium	336,360	Belgium	336,000	Belgium	336,000
Netherlands	250,594	Netherlands	250,000	Netherlands	250,000
France	136,051	France	136,000	France	136,000
Greece	22,193	Greece	22,000	Greece	22,000
Great Britain	9,569	Great Britain	10,000	Great Britain	10,000
Spain	6,669	Spain	7,000	Spain	7,000
Denmark	6,339	Denmark	6,000	Denmark	6,000
Luxemburg	5,075	Luxemburg	5,000	Luxemburg	5,000
Austria	4,992	Austria	5,000	Austria	5,000
Total for Others	2,101,840	Total for Others	2,100,000	Total for Others	2,100,000
Others not listed	14,266	Others not listed	20,000	Others not listed	20,000
Grand Total	2,116,106	Grand Total	2,120,000	Grand Total	2,120,000

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 3: PSD for Cheese (in 1,000 MT), average monthly Import Prices (in US$ per MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	30	30	30	30	0	15
Production	1,006	1,006	1,060	1,046	0	1,060
Intra EC Imports	367	367	375	375	0	380
Other Imports	27	27	20	20	0	20
TOTAL Imports	394	394	395	395	0	400
TOTAL SUPPLY	1,430	1,430	1,485	1,471	0	1,475
Intra EC Exports	297	297	308	308	0	307
Other Exports	61	61	95	95	0	65
TOTAL Exports	358	358	403	403	0	372
Human Dom. Consumption	1,002	1,002	1,012	1,013	0	1,033
Other Use, Losses	40	40	40	40	0	40
Total Dom. Consumption	1,042	1,042	1,052	1,053	0	1,073
TOTAL Use	1,400	1,400	1,455	1,456	0	1,445
Ending Stocks	30	30	30	15	0	30
TOTAL DISTRIBUTION	1,430	1,430	1,485	1,471	0	1,475
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	12	12	12	12	0	10

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Natural/ferm. cheeses	846	846	900	890	0	900
Fresh cheeses	748	748	755	780	0	790
Processed cheeses	161	161	161	161	0	165

Year	1998	1999	% Change			1998	1999	% Change
Jan	4,018	4,772	18.8%		Jul	4,221	3,897	-7.7%
Feb	3,831	4,199	9.6%		Aug	4,386	3,878	-11.6%
Mar	4,220	4,504	6.7%		Sep	4,916	4,304	-12.4%
Apr	4,333	4,083	-5.8%		Oct	4,688	4,224	-9.9%
May	4,447	4,324	-2.8%		Nov	4,775	4,307	-9.8%
Jun	4,512	4,131	-8.4%		Dec	4,916	4,200	-14.6%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 4: German Import and Export of Cheese (in MT)

Imports for	1999		2000		2001
U.S.	65	U.S.	50	U.S.	50
Others		Others		Others	
Netherlands	192,000	Netherlands	192,000	Netherlands	198,000
France	93,828	France	94,000	France	94,000
Denmark	27,070	Denmark	27,000	Denmark	27,000
Italy	20,996	Italy	21,000	Italy	21,000
Switzerland	13,803	Switzerland	14,000	Switzerland	14,000
Austria	9,073	Austria	9,000	Austria	9,000
Greece	7,257	Greece	7,000	Greece	7,000
Belgium	7,116	Belgium	7,000	Belgium	7,000
New Zealand	5,506	New Zealand	5,500	New Zealand	5,500
Great Britain	5,369	Great Britain	5,400	Great Britain	5,400
Total for Others	382,018	Total for Others	381,900	Total for Others	387,900
Others not listed	12,432	Others not listed	13,000	Others not listed	13,000
Grand Total	394,515	Grand Total	394,950	Grand Total	400,950

Exports for	1999		2000		2001
U.S.	12,148	U.S.	12,000	U.S.	10,000
Others		Others		Others	
Italy	117,889	Italy	126,000	Italy	120,000
France	37,095	Russia	55,000	Russia	65,000
Netherlands	25,124	France	35,000	France	35,000
Belgium	23,249	Netherlands	31,000	Netherlands	31,000
Great Britain	19,969	Belgium/Lux.	23,000	Belgium/Lux.	23,000
Austria	19,558	Great Britain	20,000	Great Britain	20,000
Russia	16,565	Spain	15,000	Spain	15,000
Spain	16,273	Denmark	15,000	Denmark	15,000
Greece	13,214	Greece	15,000	Greece	15,000
Denmark	12,610	Austria	13,000	Austria	13,000
Total for Others	301,546	Total for Others	348,000	Total for Others	352,000
Others not listed	44,249	Others not listed	43,000	Others not listed	10,000
Grand Total	357,943	Grand Total	403,000	Grand Total	372,000

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 5: PSD for Butter (in 1,000 MT), average monthly Import Prices (in US$ per MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	9	9	20	17	0	16
Production	427	427	410	410	0	407
Intra EC Imports	171	171	160	165	0	170
Other Imports	5	5	5	5	0	5
TOTAL Imports	176	176	165	170	0	175
TOTAL SUPPLY	612	612	595	597	0	598
Intra EC Exports	36	36	40	35	0	35
Other Exports	11	11	5	5	0	5
TOTAL Exports	47	47	45	40	0	40
Domestic Consumption	545	548	540	541	0	540
TOTAL Use	592	595	585	581	0	580
Ending Stocks	20	17	10	16	0	18
TOTAL DISTRIBUTION	612	612	595	597	0	598
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	3,688	3,840	4.1%		Jul	3,691	3,184	-13.7%
Feb	3,617	3,573	-1.2%		Aug	3,729	3,316	-11.1%
Mar	3,528	3,486	-1.2%		Sep	3,850	2,909	-24.4%
Apr	3,595	3,327	-7.5%		Oct	4,020	3,321	-17.4%
May	3,681	3,323	-9.7%		Nov	3,984	3,248	-18.5%
Jun	3,646	3,316	-9.1%		Dec	3,966	2,902	-26.8%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 6: German Import and Export of Butter (in MT)

Imports for	1999		2000		2001
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
Netherlands	65,000	Netherlands	68,000	Netherlands	68,000
Ireland	45,000	Ireland	49,000	Ireland	49,000
Belgium	18,000	Belgium/Lux.	16,000	Belgium/Lux.	16,000
France	12,000	France	7,000	France	7,000
Italy	9,000	Italy	5,000	Italy	5,000
Great Britain	7,000	Great Britain	4,000	Great Britain	4,000
Portugal	5,000	Finland	2,000	Finland	2,000
Austria	3,000	Portugal	1,000	Portugal	1,000
Denmark	2,000	Austria	1,000	Austria	1,000
Finland	2,000	Denmark	1,000	Denmark	1,000
Total for Others	168,000	Total for Others	154,000	Total for Others	154,000
Others not listed	8,000	Others not listed	16,000	Others not listed	16,000
Grand Total	176,000	Grand Total	170,000	Grand Total	170,000

Exports for	1999		2000		2001
U.S.	39	U.S.	30	U.S.	30
Others		Others		Others	
Italy	9,466	Italy	7,500	Italy	7,500
France	7,203	Belgium/Lux	7,000	Belgium/Lux	7,000
Belgium	7,136	Netherlands	6,500	Netherlands	6,500
Netherlands	4,838	France	5,000	France	5,000
Russia	3,355	Russia	3,000	Russia	3,000
Denmark	2,310	Austria	1,500	Austria	1,500
Uzbekistan	2,194	Portugal	1,500	Portugal	1,500
Austria	1,992	Bosnia-Herceg.	1,000	Bosnia-Herceg.	1,000
Bosnia-Herceg.	920	Denmark	1,000	Denmark	1,000
Great Britain	810	Uzbekistan	1,000	Uzbekistan	1,000
Total for Others	40,224	Total for Others	35,000	Total for Others	35,000
Others not listed	6,800	Others not listed	5,000	Others not listed	5,000
Grand Total	47,063	Grand Total	40,030	Grand Total	40,030

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 7: PSD for Nonfat Milk Powder (in 1,000 MT), average monthly Import Prices (in US$ per MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	23	23	20	20	0	10
Production	331	331	300	300	0	290
Intra EC Imports	28	28	35	35	0	40
Other Imports	22	22	15	15	0	15
TOTAL Imports	50	50	50	50	0	55
TOTAL SUPPLY	404	404	370	370	0	355
Intra EC Exports	236	236	230	230	0	225
Other Exports	64	64	45	45	0	40
TOTAL Exports	300	300	275	275	0	265
Human Dom. Consumption	18	18	20	20	0	18
Other Use, Losses	66	66	65	65	0	62
Total Dom. Consumption	84	84	85	85	0	80
TOTAL Use	384	384	360	360	0	345
Ending Stocks	20	20	10	10	0	10
TOTAL DISTRIBUTION	404	404	370	370	0	355
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	1,915	1,454	-24.1%		Jul	1,026	712	-30.6%
Feb	939	1,277	36.0%		Aug	1,057	1,395	32.0%
Mar	1,701	1,274	-25.1%		Sep	1,189	1,467	23.4%
Apr	1,452	1,167	-19.6%		Oct	2,050	1,429	-30.3%
May	483	1,485	207.5%		Nov	1,081	1,568	45.1%
Jun	1,584	1,434	-9.5%		Dec	1,765	1,399	-20.7%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 8: German Import and Export of Nonfat Milk Powder (in MT)

Imports for	1999			2000			2001
U.S.	0		U.S.	0		U.S.	0
Others			Others			Others	
Netherlands	11,728		Austria	15,000		Austria	15,000
Austria	10,297		Netherlands	10,000		Netherlands	10,000
Poland	7,842		Poland	9,000		Poland	9,000
Czech Republic	2,502		Ukraine	3,000		Ukraine	3,000
France	2,440		France	2,000		France	2,000
Ukraine	1,898		Czech Republic	2,000		Czech Republic	2,000
Lithuania	1,323		Lithuania	1,800		Lithuania	1,800
Ireland	1,258		Ireland	1,500		Ireland	1,500
Hungary	1,152		Sweden	1,500		Sweden	1,500
Latvia	1,068		Latvia	1,170		Latvia	1,170
Total for Others	41,508		Total for Others	46,970		Total for Others	46,970
Others not listed	8,220		Others not listed	3,000		Others not listed	8,000
Grand Total	49,728		Grand Total	49,970		Grand Total	54,970

Exports for	1999			2000			2001
U.S.	60		U.S.	43		U.S.	43
Others			Others			Others	
Netherlands	132,374		Netherlands	141,000		Netherlands	141,000
Italy	76,654		Italy	70,000		Italy	70,000
Russia	9,885		Russia	10,000		Russia	10,000
Mexico	9,689		Mexico	6,000		Mexico	6,000
Spain	8,386		Spain	6,000		Spain	6,000
France	7,402		France	5,000		France	5,000
Indonesia	4,797		Indonesia	3,500		Indonesia	3,500
Algeria	4,698		Algeria	2,000		Algeria	2,000
India	3,514		India	2,000		India	2,000
Austria	3,446		Austria	2,000		Austria	2,000
Total for Others	260,845		Total for Others	247,500		Total for Others	247,500
Others not listed	39,592		Others not listed	27,000		Others not listed	17,000
Grand Total	300,497		Grand Total	274,543		Grand Total	264,543

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 9: PSD for Whole Milk Powder (in 1,000 MT), average monthly Import Prices (in US$ per MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	10	10	10	10	0	0
Production	210	210	220	215	0	210
Intra EC Imports	30	30	30	35	0	30
Other Imports	0	0	0	0	0	0
TOTAL Imports	30	30	30	35	0	30
TOTAL SUPPLY	250	250	260	260	0	240
Intra EC Exports	50	50	50	65	0	60
Other Exports	20	20	25	30	0	30
TOTAL Exports	70	70	75	95	0	90
Human Dom. Consumption	170	170	170	165	0	150
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	170	170	170	165	0	150
TOTAL Use	240	240	245	260	0	240
Ending Stocks	10	10	15	0	0	0
TOTAL DISTRIBUTION	250	250	260	260	0	240
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	2,593	2,707	4.4%		Jul	2,589	2,379	-8.1%
Feb	2,667	2,710	1.6%		Aug	2,640	2,379	-9.9%
Mar	2,386	2,423	1.6%		Sep	2,816	2,397	-14.9%
Apr	2,601	2,574	-1.0%		Oct	2,730	2,551	-6.6%
May	2,581	2,405	-6.8%		Nov	2,815	2,398	-14.8%
Jun	2,448	2,414	-1.4%		Dec	2,745	2,472	-9.9%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 10: German Import and Export of Whole Milk Powder (in MT)

Imports for	1999		2000		2001
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
Netherlands	12,000	Netherlands	16,000	Netherlands	11,000
France	8,287	France	9,000	France	9,000
Ireland	3,874	Ireland	4,000	Ireland	4,000
Great Britain	2,594	Belgium	2,000	Belgium	2,000
Belgium	1,330	Italy	1,000	Italy	1,000
Denmark	692	Great Britain	900	Great Britain	900
Austria	642	Austria	900	Austria	900
Italy	495	Denmark	400	Denmark	400
Poland	156	Poland	300	Poland	300
Czech Republic	53	Sweden	200	Sweden	200
Total for Others	30,123	Total for Others	34,700	Total for Others	29,700
Others not listed	100	Others not listed	400	Others not listed	400
Grand Total	30,223	Grand Total	35,100	Grand Total	30,100

Exports for	1999		2000		2001
U.S.	24	U.S.	50	U.S.	50
Others		Others		Others	
Netherlands	34,000	Netherlands	50,000	Netherlands	45,000
Italy	6,173	Italy	6,000	Italy	6,000
Saudi Arabia	5,070	France	5,000	France	5,000
France	4,505	Belgium	4,000	Belgium	4,000
Algeria	3,348	Russia	3,500	Russia	3,500
Belgium	3,286	Austria	2,300	Austria	2,300
Libya	2,335	Jordan	2,200	Jordan	2,200
Greece	1,838	Algeria	2,200	Algeria	2,200
Israel	1,715	Saudi Arabia	2,100	Saudi Arabia	2,100
Austria	1,561	Israel	2,000	Israel	2,000
Total for Others	63,831	Total for Others	79,300	Total for Others	74,300
Others not listed	12,000	Others not listed	16,000	Others not listed	16,000
Grand Total	75,855	Grand Total	95,350	Grand Total	90,350

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 11: PSD for Casein (in 1,000 MT), average monthly Import Prices (in US$ MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	2	2	2	2	0	2
Production	12	12	12	12	0	12
Intra EC Imports	17	17	12	12	0	12
Other Imports	23	23	26	26	0	26
TOTAL Imports	40	40	38	38	0	38
TOTAL SUPPLY	54	54	52	52	0	52
Intra EC Exports	14	14	15	15	0	15
Other Exports	14	14	10	10	0	10
TOTAL Exports	28	28	25	25	0	25
Human Dom. Consumption	19	19	19	19	0	19
Other Use, Losses	5	5	6	6	0	6
Total Dom. Consumption	24	24	25	25	0	25
TOTAL Use	52	52	50	50	0	50
Ending Stocks	2	2	2	2	0	2
TOTAL DISTRIBUTION	54	54	52	52	0	52
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	4	4	4	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	3,730	4,152	11.3%		Jul	3,857	3,535	-8.3%
Feb	3,744	4,043	8.0%		Aug	3,745	3,243	-13.4%
Mar	3,756	3,841	2.3%		Sep	3,871	3,097	-20.0%
Apr	3,918	3,823	-2.4%		Oct	4,161	3,431	-17.5%
May	3,937	3,582	-9.0%		Nov	4,041	3,259	-19.4%
Jun	3,832	3,282	-14.4%		Dec	3,820	3,392	-11.2%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 12: German Import and Export of Casein (in MT)

Imports for	1999		2000		2001
U.S.	176	U.S.	200	U.S.	200
Others		Others		Others	
New Zealand	7,153	New Zealand	9,000	New Zealand	9,000
Ukraine	6,696	Ukraine	8,000	Ukraine	8,000
Netherlands	5,722	Netherlands	4,000	Netherlands	4,000
Ireland	4,002	Russia	3,800	Russia	3,800
Russia	3,591	France	2,000	France	2,000
Denmark	2,654	Ireland	2,000	Ireland	2,000
France	2,143	India	1,500	India	1,500
Great Britain	1,045	China	1,300	China	1,300
Lithuania	942	Denmark	1,200	Denmark	1,200
Latvia	825	Lithuania	1,000	Lithuania	1,000
Total for Others	34,773	Total for Others	33,800	Total for Others	33,800
Others not listed	4,563	Others not listed	4,000	Others not listed	4,000
Grand Total	39,512	Grand Total	38,000	Grand Total	38,000

Exports for	1999		2000		2001
U.S.	4,452	U.S.	4,000	U.S.	4,000
Others		Others		Others	
Italy	2,914	Italy	4,000	Italy	4,000
Spain	2,472	Spain	2,500	Spain	2,500
France	2,246	Netherlands	2,300	Netherlands	2,300
Netherlands	2,129	France	2,200	France	2,200
Belgium	1,447	Belgium	2,000	Belgium	2,000
Austria	1,092	Great Britain	1,500	Great Britain	1,500
Japan	1,071	Austria	1,200	Austria	1,200
Poland	900	Morocco	1,200	Morocco	1,200
Russia	873	Poland	1,000	Poland	1,000
Canada	827	Japan	1,000	Japan	1,000
Total for Others	15,971	Total for Others	18,900	Total for Others	18,900
Others not listed	8,193	Others not listed	2,500	Others not listed	2,500
Grand Total	28,616	Grand Total	25,400	Grand Total	25,400

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 13: PSD for Whey Powder (in 1,000 MT), average monthly Import Prices (inUS$ per MT)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Production	196	196	205	205	0	205
Intra EC Imports	45	45	45	45	0	45
Other Imports	1	1	1	1	0	1
TOTAL Imports	46	46	46	46	0	46
TOTAL SUPPLY	242	242	251	251	0	251
Intra EC Exports	121	121	129	129	0	129
Other Exports	6	6	6	6	0	6
TOTAL Exports	127	127	135	135	0	135
Human Dom. Consumption	12	12	12	12	0	12
Other Use, Losses	103	103	104	104	0	104
Total Dom. Consumption	115	115	116	116	0	116
TOTAL Use	242	242	251	251	0	251
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	242	242	251	251	0	251
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	729	1,039	42.5%		Jul	865	855	-1.2%
Feb	953	903	-5.2%		Aug	816	848	3.9%
Mar	1,048	1,076	2.7%		Sep	919	955	3.9%
Apr	896	1,001	11.7%		Oct	1,098	1,057	-3.7%
May	1,211	891	-26.4%		Nov	1,118	847	-24.2%
Jun	1,006	859	-14.6%		Dec	769	872	13.4%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 14: German Import and Export of Whey Powder (in MT)

Imports for	1999		2000		2001
U.S.	69	U.S.	70	U.S.	70
Others		Others		Others	
Netherlands	20,712	Netherlands	22,000	Netherlands	22,000
France	15,792	France	15,000	France	15,000
Denmark	3,174	Denmark	3,000	Denmark	3,000
Ireland	2,157	Ireland	1,300	Ireland	1,300
Austria	1,263	Belgium	1,100	Belgium	1,100
Belgium	1,181	Austria	1,000	Austria	1,000
Great Britain	599	Sweden	400	Sweden	400
Sweden	424	Great Britain	300	Great Britain	300
Czech Republic	372	Czech Republic	300	Czech Republic	300
Finland	102	Finland	150	Finland	150
Total for Others	45,776	Total for Others	44,550	Total for Others	44,550
Others not listed	154	Others not listed	1,000	Others not listed	1,000
Grand Total	45,999	Grand Total	45,620	Grand Total	45,620

Exports for	1999		2000		2001
U.S.	94	U.S.	120	U.S.	120
Others		Others		Others	
Netherlands	86,706	Netherlands	93,000	Netherlands	93,000
France	10,134	France	15,000	France	15,000
Italy	8,763	Italy	6,500	Italy	6,500
Belgium	5,603	Belgium	4,800	Belgium	4,800
Great Britain	3,546	Great Britain	2,700	Great Britain	2,700
Austria	2,556	Austria	1,900	Austria	1,900
Spain	2,141	Spain	1,400	Spain	1,400
Thailand	1,654	Thailand	1,300	Thailand	1,300
Japan	1,570	Japan	1,200	Japan	1,200
Denmark	1,258	Denmark	1,000	Denmark	1,000
Total for Others	123,931	Total for Others	128,800	Total for Others	128,800
Others not listed	2,710	Others not listed	6,000	Others not listed	6,000

Grand Total	126,735		Grand Total	134,920		Grand Total	134,920

Source: FAS/Berlin based on official data from the German Office of Statistics in Wiesbaden.
FAS/Berlin estimates.

Table 15: Number of Cows by State in Germany, December Census (in 1,000 head)

State/December of	1995	1996	1997	1998	1999	% Change 96/97
A. Western Germany 1/						
Schleswig-Holstein	420.9	422.2	401.8	395.1	282.0	-3.2
Lower Saxony	872.6	860.8	827.3	807.6	805.0	-0.3
Northrhine-Westphalia	468.0	462.2	451.2	422.1	404.0	-4.4
Hesse	189.7	187.5	176.6	174.7	171.0	-2.2
Rhineland-Palatinate	148.5	148.5	142.0	136.0	135.0	-0.8
Saarland	17.0	17.3	16.5	15.7	16.0	3.4
Baden-Wuerttemberg	498.5	490.3	465.7	447.4	438.0	-2.1
Bavaria	1,566.7	1,558.6	1,513.4	1,474.4	1,441.0	-2.3
SUBTOTAL	4,187.7	4,152.6	3,999.7	3,878.4	3,797.0	-2.1
B. Eastern Germany 2/						
Brandenburg	228.0	229.6	221.8	210.8	199.0	-5.7
Mecklenburg-Vorpommern	233.1	231.3	226.0	204.0	193.0	-5.3
Saxony	247.5	247.9	250.0	233.7	220.0	-5.8
Saxony-Anhalt	168.6	168.8	166.5	153.6	158.0	2.8
Thuringia	164.0	164.1	161.7	151.9	142.0	-6.3
SUBTOTAL	1,041.7	1,041.5	1,025.9	954.0	912.0	-4.4
C. Total Germany	5,229.4	5,194.7	5,026.2	4,833.0	4,709.0	-2.8

1/ Includes Hamburg, Bremen and West Berlin.
2/ Includes East Berlin.
Note: Until 1997 December Census, since 1998 November Census.

Source: BML, Daten-Analysen and Federal Statistical Office in Wiesbaden.

Table 16: Cattle Inventory in Germany (in million head, 1,000 breeders)

December of	**1995**	**1996**	**1997**	**1998**	**1999**	**% Change 96/97**
Total cattle	15.89	15.76	15.23	14.94	14.66	-1.9
western states	12.97	12.88	12.44	12.23	12.01	-1.8
eastern states	2.92	2.88	2.79	2.71	2.65	-2.3
Milk cows	5.23	5.19	5.03	4.83	4.71	-2.8
western states	4.19	4.15	4.00	3.88	3.80	-2.1
eastern states	1.04	1.04	1.03	0.95	0.91	-4.4
Cows (beef breeds)	0.57	0.59	0.61	0.64	0.69	+7.4
western states	0.37	0.39	0.39	0.39	0.41	+5.9
eastern states	0.20	0.21	0.22	0.25	0.27	+9.7
Heifers over 1 year	2.84	2.92	2.90	2.91	2.82	-0.03
western states	2.25	2.31	2.29	2.31	2.24	-0.03
eastern states	0.58	0.61	0.62	0.59	0.58	-0.02
Calves under 6 months	2.47	2.42	2.28	2.19	2.18	-0.6
western states	2.05	2.03	1.92	1.82	1.82	+0.0
eastern states	0.42	0.39	0.36	0.37	0.36	-3.9
Total milk cow breeders, west	187	178	165	157	143	-8.7
Total milk cow breeders, east	8	8	8	7	6	-11.0
AVG milk cows per farm, west	22	23	-	-	-	-
AVG milk cows per farm, east	123	128	-	-	-	-

Based on December cattle census.
Note: Until 1997 December Census, since 1998 November Census.

Source: Agrarwirtschaft, BML-Daten-Analysen, various issues, Federal Statistical Office Wiesbaden.

Table 17: Production of Fluid Milk Products in Germany (in 1,000 MT)

	1995	**1996**	**1997**	**1998**	**1999**
Total fluid milk	5,603.0	5,608.4	5,503.4	5404.1	5,389.9
thereof **whole milk**	3,477.2	3,451.8	3,327.1	3291.2	3,215.0
- Pasteurized milk	1,995.0	1,923.6	1,800.1	1779.8	1,683.0
- UHT milk	1,480.1	1,523.2	1,525.9	1510.5	1,530.7
- Sterilized	2.1	5.0	1.2	0.9	1.2
thereof **partly skimmed milk**	2,021.4	2,050.0	2,080.1	2020.2	2,094.3
- Pasteurized milk	257.2	243.9	255.6	255.0	269.4
- UHT milk	1,757.2	1,787.8	1,820.3	1,761.4	1,821.4
- Sterilized	7.0	18.2	4.3	3.9	3.5
thereof **skimmed milk**	104.4	106.6	96.2	92.7	80.6
- Pasteurized	3.7	3.4	1.5	1.2	1.4
- UHT milk	100.6	103.0	94.9	91.6	79.3
- Sterilized	0.0	0.4	0.0	0.0	-
Buttermilk products	197.9	193.4	218.7	210.4	221.2
Sour milk and kefir	150.9	151.5	153.4	158.0	160.6
Yogurt products	239.6	399.2	337.6	282.9	279.0
Chocolate drinks	196.6	191.8	191.8	205.5	228.5
Other **milk drinks**	90.6	118.1	148.0	153.1	182.9
Other **milk mix products**	513.6	534.9	531.3	576.7	625.0
Other **milk mix products from yogurt, kefir, sour milk**	934.2	877.0	1,081.4	1,183.7	1,195.4
Cream incl. coffee cream	523.2	545.3	548.8	544.1	548.1

Source: BML Daten-Analysen, various issues.

Table 18: Milk Prices to Farmers (Germany, in DM per 100 Kilogram)

CY	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
1998	56.6	56.3	56.1	55.9	55.8	56.2	57.0	58.2	59.6	60.1	60.7	59.4	58.1
1999	56.8	56.2	55.0	53.8	53.2	53.0	53.0	53.9	55.4	57.3	58.1	57.0	55.7
2000	56.1	55.6	55.2	54.9	54.8								

Note: Average prices for milk with 3.7 percent fat and 3.4 percent protein excl. VAT, at the farm level.

Source: ZMP Marktbericht Milch, various issues. In recent years the U.S. dollar/DM exchange rate has been as follows:

Table 19: Cheese Production by Type and Variety (in 1,000 MT)

Type	1993	1994	1995	1996	1997	1998	1999 2/
Emmental	42.8	47.3	45.3	56.2	57.9	61.6	64.0
Chester (standard product)	51.7	48.2	47.3	48.6	53.4	47.0	46.2
Other hard cheeses 1/	86.6	84.3	82.3	88.9	71.9	74.7	70.8
Total hard cheese	**181.1**	**179.8**	**174.9**	**193.7**	**183.2**	**183.3**	**180.9**
Tilsit	26.0	25.3	26.6	27.4	31.5	33.8	31.7
Edam total	124.6	135.1	148.1	149.2	153.9	151.6	142.2
Of which 30% fat	39.2	36.7	36.3	34.5	30.2	29.8	26.6
Of which 40% fat	83.8	96.9	110.2	113.4	121.8	119.8	114.1
Gouda	91.2	87.0	84.8	109.9	148.3	141.1	120.3
Other Schnittkäse	88.2	105.9	105.5	128.4	121.7	134.0	149.8
Total Sliced Cheese	**330.0**	**353.3**	**365.0**	**415.0**	**455.4**	**460.6**	**444.1**
All Blue-Vein	5.4	5.6	6.2	7.0	7.4	6.7	7.3
Butter cheese	16.6	16.8	18.9	20.2	23.1	23.8	24.3
Other semi-hard Sliced Cheese	9.3	12.6	13.4	12.9	14.6	15.2	18.9

Total Semi-sliced Cheeses	**31.3**	**35.0**	**38.4**	**40.0**	**45.1**	**45.7**	**50.5**
Total Camembert	32.4	32.0	31.7	31.5	33.1	30.9	28.5
Of which 30-45% fat	14.4	14.0	14.6	15.0	14.9	14.0	12.5
Of which 45-50% fat	9.3	9.3	7.7	6.6	9.2	9.6	9.3
Of which 50% fat and more	8.7	8.8	9.4	10.0	9.0	7.3	6.3
Brie	7.1	5.6	4.1	3.7	3.2	2.4	1.9
Romadur	2.0	1.9	1.9	1.9	1.9	1.8	1.7
Limburger	7.3	7.3	7.5	7.4	7.5	8.6	8.3
Muensterkäse	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Other soft cheeses	49.4	50.7	57.6	63.6	75.9	84.4	96.8
Of which 40-45% fat	10.9	8.0	8.8	11.6	6.8	6.8	7.7
Total soft cheese	**98.5**	**97.8**	**103.2**	**108.5**	**121.9**	**128.6**	**137.4**
Soured milk cheese	29.1	28.3	28.9	28.8	28.4	28.9	28.1
Cooked cheese	5.7	5.6	5.6	5.6	5.4	5.0	4.6
Total soured milk cheese and cooked cheese	**34.8**	**33.9**	**34.5**	**34.4**	**33.9**	**34.0**	**32.7**
Cream & double-cream fresh cheese	4.3	5.0	4.9	5.9	6.9	8.5	13.2
Quark	348.8	352.6	354.3	346.8	340.3	330.4	325.1
Schichtkaese	10.1	10.3	9.5	8.8	8.2	7.6	6.9
Fresh cheese with fruit	132.6	164.2	192.0	211.7	219.5	228.2	225.8
Fresh cheese with herbs	62.8	61.2	66.3	54.9	59.9	61.7	61.0
Other fresh cheeses	102.0	105.9	109.6	110.4	116.6	113.4	116.3
Total fresh cheese	**660.6**	**699.2**	**736.6**	**738.5**	**751.3**	**749.7**	**748.4**
Of which less than 20% fat	302.8	304.6	306.4	304.9	304.5	302.5	308.9
Of which 20-40% fat	184.4	214.6	235.7	244.3	252.5	257.0	246.7
Of which 40-45% fat	94.0	97.3	103.8	97.6	96.6	95.6	93.8
Of which over 45% fat	79.3	83.6	90.7	91.3	97.7	93.6	96.8
Total Cheeses	**1,336.3**	**1,399.0**	**1,452.6**	**1,527.4**	**1,590.8**	**1,601.9**	**1,594.0**

1/ Other Chester and Emmental produced from pasteurized milk.
2/ Preliminary.

Source: ZMP-Dairy Review 2000.

Table 20: Cheese Prices at Dairy (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
A. Gouda 1/												
1997	6.00	6.00	6.09	6.10	6.10	6.10	5.83	5.77	6.05	6.21	6.26	6.26
1998	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26
1999	6.26	6.12	5.96	5.83	5.70	5.32	5.20	5.20	5.50	5.58	5.73	5.74
2000	5.78	5.78	5.85	5.87	6.03							
B. Emmentaler 2/												
1997	8.09	8.03	7.98	7.96	7.88	7.84	7.91	7.95	7.99	7.96	7.94	7.90
1998	7.93	7.93	7.94	7.94	7.95	7.98	8.03	8.04	8.03	8.03	8.04	8.00
1999	8.00	7.96	7.94	7.89	7.71	7.73	7.66	7.75	7.78	7.76	7.78	7.79
2000	7.80	7.82	7.83	7.81	7.83							

1/ Price at Cologne market incl. Freight to warehouse of wholesaler, excl. VAT.
2/ Price at Kempten (Bavaria) at dairy, excl. VAT.

Source and contract terms: ZMP, Europamarkt Milch, Butter, Käse, various issues.

Table 21: Per Capita Consumption of Cheese by Variety (in Kilogram)

	1991	1992	1993	1994	1995	1996	1997	1998	1999 1/
Hard Cheeses	1.0	1.1	1.1	1.2	1.3	1.3	1.3	1.2	1.3
Medium Hard Cheeses	5.2	5.5	5.8	5.9	5.9	6.3	6.6	6.7	6.8
Soft Cheeses	1.6	1.6	1.7	1.8	1.9	1.9	2.2	2.2	2.3
Boiled Cheeses	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Cheese Spreads	1.5	1.5	1.4	1.5	1.4	1.4	1.3	1.4	1.4
Fresh Cheeses	7.8	8.0	8.0	8.5	8.9	8.6	8.7	8.5	8.6
- Curds	4.5	4.5	4.4	4.5	4.5	4.4	4.2	4.0	4.0
- Other	3.2	3.2	3.6	3.9	4.4	4.3	4.5	4.5	4.6
TOTAL	17.5	18.3	18.5	19.3	19.8	20.1	20.3	20.4	20.7

1/ Preliminary.

Note: Differences are due to rounding.

Source: ZMP Bilanz Milch 2000.

Table 22: Butter Wholesale Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
A. Cologne Market												
1997	6.27	6.37	6.45	6.45	6.45	6.58	6.67	6.80	6.98	7.13	7.16	7.18
1998	7.14	7.05	6.94	6.92	6.85	6.86	6.95	7.04	7.11	7.11	6.94	6.79
1999	6.65	6.46	6.09	6.03	6.03	6.03	6.04	6.08	6.15	6.33	6.40	6.40
2000	6.39	6.33	6.29	6.28	6.28							
B. Eastern Germany/Hannover Market in Bulk												
1997	6.25	6.33	6.38	6.42	6.45	6.52	6.71	6.80	6.98	7.11	7.16	7.18
1998	7.10	6.89	6.80	6.80	6.72	6.79	6.91	6.98	6.98	6.93	6.73	6.73
1999	6.51	6.25	5.88	5.86	5.85	5.85	5.86	5.90	6.02	6.18	6.24	6.25
2000	6.10	5.94	5.90	5.94	5.95							

Price in bulk at dairy incl. freight to warehouse of wholesaler and excl. VAT.

Source: ZMP Europamarkt Milch, Butter, Käse, various issues.

Table 23: Butter Production in Dairies by Type (in 1,000 MT)

	1994	1995	1996	1997	1998	1999 1/	% Change
Branded butter, sweet cream	48.6	53.8	46.8	41.8	41.0	43.8	+7.0
Branded butter, sour cream	64.6	42.4	37.8	31.6	26.0	23.0	-11.6
Branded butter, NINO produce	279.3	321.7	326.9	292.4	296.8	292.5	-1.5
Other butter 2/	5.4	5.6	6.1	5.9	5.9	4.5	-22.8
Butter for cooking 3/	63.4	62.7	62.6	70.6	56.9	63.3	+11.3
Total	461.3	486.2	480.2	442.3	426.4	427.0	+0.1
Other butter products 4/	19.8	21.6	—	—	—	—	—

1/ Preliminary.
2/ Second grade and whey butter.
3/ Including butter oil made directly from cream.

4/ Mixed fats and other butter preparations usually made with butter.

Source: ZMP Dairy Review 2000.

Table 24: Manufacture of Milk Fat Products and Dairy Spreads (in 1,000 MT)

	Directly from cream		From butter		Total	
	1997	**1998 1/**	**1997**	**1998 1/**	**1997**	**1998 1/**
Butter preparations	0.4	0.3	8.2	8.8	8.6	9.1
Spreads	4.1	6.9	9.7	10.8	13.8	17.8
Of which - 3/4-fat butter	—	—	0.0	0.0	0.0	0.0
- half-fat butter	0.4	0.5	96.6	10.7	10.1	11.2
- others	3.7	6.5	0.1	0.1	3.7	6.6
Milk fat products	17.5	18.8	12.1	14.4	29.6	33.2
Of which - butter concentrate	16.4	18.8	12.0	14.3	28.3	33.1
- butter fat/oil 96%	1.2	—	0.1	0.1	1.3	0.1

1/ Preliminary.

Source: ZMP Dairy Review 1999.

Table 25: Butter Consumption (in MT, Kilogram per Capita)

	1993	**1994**	**1995**	**1996**	**1997**	**1998 1/**	**1999 2/**
Total (MT)	556,600	560,000	583,100	595,400	578,700	555,400	548,300
Per Capita (kg)	6.8	6.9	7.1	7.3	7.1	6.8	6.7

1/ Preliminary.
2/ Estimate.

Source: ZMP Dairy Review 2000.

Table 26: Nonfat Dry Milk Factory Prices (in DM per Kilogram)

Year	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
1999	3.95	3.95	3.96	3.96	3.97	3.97	4.00	4.04	4.14	4.26	4.27	4.31
2000	4.31	4.34	4.38	4.41	4.65							

ADMI Extra.

Source & Contract Terms: ZMP, Europamarkt Dauermilch, various issues.

Table 27: Nonfat Dry Milk Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	4.07	4.18	4.10	3.99	3.99	3.98	3.94	3.99	4.10	4.12	4.12	4.14
1998	4.04	3.96	3.95	3.93	3.91	3.91	3.91	3.94	3.87	3.74	3.74	3.76
1999	3.74	3.76	3.77	3.75	3.75	3.80	3.87	3.94	4.10	4.19	4.19	4.19
2000	4.19	4.24	4.27	4.21	4.41							

Spray, Food grade, excl. VAT.

Source & Contract Terms: ZMP, Europamarkt Dauermilch, various issues.

Table 28: Whole Milk Powder Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	5.09	5.11	5.12	5.12	5.10	5.06	5.03	5.07	5.16	5.22	5.29	5.33
1998	5.28	5.16	5.13	5.08	5.07	5.11	5.10	5.08	5.06	5.04	5.03	5.01
1999	5.00	4.97	4.94	4.90	4.90	4.90	4.94	5.03	5.05	5.14	5.18	5.19
2000	5.18	5.13	5.12	5.15	5.37							

Spray, 26 percent fat, excl. VAT.

Source: ZMP, Europamarkt Dauermilch, various issues.

Table 29: Casein (Food Grade) Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	7.80	7.90	7.90	7.90	7.75	7.75	7.80	7.95	8.00	8.00	8.00	8.00
1998	8.00	8.00	8.00	7.75	7.75	7.65	7.65	7.65	7.60	7.55	7.55	7.50
1999	7.50	7.30	7.25	7.25	7.10	7.10	7.10	7.20	7.60	7.70	7.85	7.90
2000	8.30	8.45	8.90	9.00	9.50							

Source: ZMP, Europamarkt Dauermilch, various issues.

Table 30: Whey Powder (Feed Grade) Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	0.76	0.76	0.74	0.69	0.66	0.67	0.70	0.73	0.81	0.86	0.96	1.14
1998	1.19	0.99	0.91	0.93	0.98	1.03	1.11	1.11	1.00	0.89	0.96	0.92
1999	0.84	0.78	0.79	0.79	0.85	0.82	0.82	0.81	0.75	0.79	0.87	0.89
2000	0.96	0.89	0.83	0.84	0.89							

Spray, 26 percent fat, excl. VAT.

Source: ZMP, Europamarkt Dauermilch, various issues.

Table 31: Whey Powder (Food Grade) Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	0.88	0.89	0.87	0.84	0.81	0.81	0.82	0.85	0.91	0.94	1.04	1.16
1998	1.24	1.10	0.99	1.03	1.07	1.09	1.16	1.19	1.14	1.00	1.07	1.05
1999	0.97	0.93	0.95	0.95	0.96	0.95	0.94	0.93	0.91	0.93	0.97	0.99
2000	1.02	1.01	0.99	0.98	0.98							

Source: ZMP, Europamarkt Dauermilch, various issues.

Section III: Strategic Feed Industry Indicator Tables

Table 32: Gross Domestic Production of Meat, Milk and Eggs (in 1,000 MT, million eggs)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	01/1998	01/1999	01/2000	01/2001
Beef/Veal	1,449	1,420	1,400	1,400
Pork	3,744	3,850	3,900	3,850
Poultry Meat	769	790	800	810
Broiler	422	430	435	440
Hens and Cocks	58	58	58	58
Ducks and Geese	42	42	42	42
Turkey	247	260	265	270
Sheep/Mutton/Goat Meat	44	44	44	44
Horse Meat	5	5	5	5
Variety Meats	329	330	330	330
Other Meat 1/	89	89	89	89
TOTAL MEAT	7,198	7,318	7,368	7,338
Egg	14,164	14,200	14,200	14,200
Milk	28,500	28,400	28,400	28,400

Source: ZMP, various “Bilanzen.” FAS/Berlin estimate.

Table 33: Animal Numbers (in 1,000 head, beginning stocks of marketing year)

Year	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	01/1998	01/1999	01/2000	01/2001
CATTLE	15,227	14,942	14,488	14,160
Calves until six months of age	2,275	2,190	2,153	2,150
Calves until one year of age	2,622	2,562	2,469	2,450
Heifers for Breeding	1,904	2,905	2,775	2,700
Other and Slaughter Animals	2,792	1,812	1,769	1,720
Suckler Cows	608	640	678	690
Dairy Cows	5,026	4,833	4,644	4,450

HOGS	24,795	26,294	25,793	25,450
Piglets	6,149	6,574	6,471	6,400
Young pigs below 50 kg	6,599	6,910	6,620	6,550
Slaughter pigs above 50 kg	9,363	10,083	10,051	10,000
Sows and Boars	2,684	2,727	2,651	2,500
SHEEP AND GOAT	2,302	2,310	2,310	2,310
Up to one year of age	560	560	560	560
Above one year of age	1,742	1,750	1,750	1,750
POULTRY	104,900	106,300	107,550	108,300
Laying Hens	50,500	50,200	50,200	50,200
Broiler	44,000	45,000	45,700	46,100
Turkey	7,500	8,000	8,400	8,700
Ducks and Geese	2,900	3,100	3,250	3,300
Horses	670	680	690	700
Dogs	5,200	5,200	5,200	5,200
Cats	6,300	6,500	6,500	6,500
Birds	5,100	5,100	5,100	5,100
Fish Aquariums	3,200	3,200	3,200	3,200
Small animals	4,100	4,600	4,600	4,600
Inland Fisheries (in MT)	52,000	52,000	52,000	52,000

1/ Small Animals.
Source: ZMP, various “Bilanzen.” German Association of Pet Food. FAS/Berlin estimate.
Statistisches Jahrbuch, Jahresbericht Deutsche Fischwirtschaft.

Table 34: Total Feed Supply (in 1,000 MT)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	07/2000
Area used for feed production (in ha)	10,495	10,495	10,495	10,495
Grain	21,934	21,934	21,934	21,934
Pulses	647	647	647	647
Oilseeds	55	55	55	55
Maniok	69	69	69	69
Dry Green Feed	450	450	450	450
Bran	1,645	1,645	1,645	1,645
Oilcakes and oilmeals	6,023	6,315	5,715	5,765
thereof Soybean Meal	3,444	3,650	3,150	3,200
Palmkernel Meal	596	500	500	500
Rapeseed Meal	1,406	1,650	1,550	1,550
Corn Germ Meal	48	50	50	50
Sunflower Meal	443	385	385	385
Other Meals	86	80	80	80
Sugar Beet Chips	1,468	1,468	1,468	1,468
Corngluten Feed	1,324	1,324	1,324	1,324
Vegetable Oils and Fats	48	48	48	48
By-Products from brewing and distilling	1,922	1,922	1,922	1,922
Other by-products from processing	1,495	1,495	1,495	1,495
Pasture and Meadows	42,802	42,802	42,802	42,802
Corn for Silage	56,844	56,844	56,844	56,844
Other fodder crops and by-products	16,853	16,853	16,853	16,853
Animal Feed	5,379	5,379	5,379	5,379
thereof Animal, Meat and Bone Meal	368	368	368	368
Fish Meal	102	102	102	102
Milk of all type	1,567	1,567	1,567	1,567
NFDM and Whey Powder	178	178	178	178
Whey	2,996	2,996	2,996	2,996
Animal Fats	168	168	168	168
TOTAL FEED	158,958	159,250	158,650	158,700
thereof COMPOUND FEED	18,559	19,030	18,810	18,239

Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 35: Compound Feed Production and Use (in 1,000 MT)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	07/2000
Grain	6,309	6,500	6,400	6,200
Pulses	398	400	400	370
Bran	1,538	1,500	1,500	1,400
Oilcakes and oilmeals	4,533	4,830	4,710	4,629
Maniok	69	70	70	70
Citrus and Fruit Pellets	534	600	600	540
Corngluten Feed	1,324	1,500	1,400	1,300
Sugar Beet Chips	1,100	1,100	1,100	1,100
Fish, animal and bone meal	461	460	460	460
Mineral Feed	870	880	880	880
Nonfat Dry Milk Powder	93	90	90	90
Other	1,330	1,100	1,200	1,200
Compound Feed Production	18,559	19,030	18,810	18,239
Compound Feed Capacity	22,300	21,900	21,800	21,600
Prod. by integrated producers	0	0	0	0
Prod. by commercial producers	18,559	19,030	18,810	18,239
For				
Horses	276	280	285	289
Cattle	7,420	7,000	7,000	7,000
Hogs	6,408	7,300	7,075	6,500
Poultry	4,198	4,200	4,200	4,200
Other Animals	257	250	250	250
Compound Feed Used	18,559	19,030	18,810	18,239
Compound Feed (KGE)	16,555	17,000	16,600	16,300
Grain/Feed Concentr. (KGE)	16,258	16,500	16,000	16,000
Other Feed (KGE)	32,742	32,000	32,000	32,000
Total Feed (KGE)	65,555	65,500	64,600	64,300

Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 36: Feed Use by Animal Type (in kg Grain/Energy Units per animal)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	07/2000
CATTLE	2,737	2,737	2,737	2,737
thereof compound feed	406	406	406	406
Grain	417	417	417	417
Pulses	22	22	22	22
Feed Concentrate	439	439	439	439
Root Crops	58	58	58	58
Hay and green fodder	1,760	1,760	1,760	1,760
Straw	10	10	10	10
Milk of all type	31	31	31	31
HOGS	670	670	670	670
thereof compound feed	233	233	233	233
Grain	509	509	509	509
Pulses	11	11	11	11
Feed Concentrate	128	128	128	128
Root Crops	10	10	10	10
Hay and green fodder	0	0	0	0
Milk of all type	12	12	12	12
POULTRY	44	44	44	44
thereof compound feed	37	37	37	37
Grain	29	29	29	29
Pulses	0	0	0	0
Feed Concentrate	15	15	15	15
SHEEP AND GOATS	337	337	337	337
thereof compound feed	62	62	62	62
Grain	67	67	67	67
Pulses	1	1	1	1
Feed Concentrate	28	28	28	28
Root Crops	5	5	5	5
Hay and green fodder	225	225	225	225

Straw	10	10	10	10
Milk of all type	1	1	1	1
HORSES	1,742	1,742	1,742	1,742
thereof compound feed	323	323	323	323
Grain	290	290	290	290
Feed Concentrate	248	248	248	248
Root Crops	46	46	46	46
Hay and green fodder	1,124	1,124	1,124	1,124
Straw	31	31	31	31
Milk of all type	3	3	3	3

Note: Figures are converted into metric kg Grain/Energy Units from metric weights.

Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 37: Net Imports of Animal Feed (in 1,000 MT)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	0/2000
Wheat	265	250	270	280
Ray	0	0	0	0
Barley	265	250	260	265
Hafer	4	5	4	4
Corn	38	40	43	44
Other Grains	29	30	25	25
Feed Rice	2	2	2	2
TOTAL GRAINS	603	577	604	620
Peas	91	90	90	90
Beans	5	5	5	5
Other Pulses	32	30	30	30
TOTAL PULSES	128	125	125	125
Oilseeds	18	25	25	25

Maniok	69	70	75	75
Dry Green Feed	133	150	150	150
Bran	180	200	180	180
Sugar Beet Chips	(126)	(120)	(120)	(120)
Corn Gluten Feed	1,143	1,200	1,100	1,100
Molasses	125	130	130	130
Citrus and Fruit Pellets	534	600	600	500
Vegetable Oils and Fats	27	30	30	30
By-Products from brewing and distilling	450	450	450	450
Potato Pulp	2	2	2	2
FEED FROM PLANT PROCESSING	2,335	2,492	2,372	2,272
Soybean Meal	3,444	3,600	3,700	3,300
Palm Kernel Meal	596	610	610	590
Rapeseed Meal	(19)	(25)	(25)	(25)
Sunflower Meal	401	400	350	350
Other oilmeals and cakes	96	100	110	90
TOTAL OILMEALS AND CAKES	4,518	4,685	4,745	4,305
Animal Meal	(282)	(290)	(290)	(290)
Fish Meal	85	110	95	85
Nonfat Dry Milk Powder	40	40	40	40
Whey Powder	20	20	20	20
Animal Fats	0	0	0	0
ANIMAL FEEDS	(137)	(120)	(135)	(145)
TOTAL NET FEED IMPORTS	7,667	8,004	7,961	7,427

Note: Comprises net trade (imports minus exports). A prarenthesis means that exports exceeded imports.
Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 38: Tariff Rates for Selected Animal Feed (in Percent or Euro per 100 kg net)

CN Code	Product Description	Bound Rate	Other
		in	Import
		Percent	Tax/Fee*
0505.90	Feather Meal	free	16
1501.00	Pig and Poultry Fat:		

1501.00.19.001	Pig Fat - edible	$17.20	16
1501.00.19.009	Pig Fat - inedible	$17.20	16
1501.00.90.001	Poultry Fat - edible	11.5	7
1501.00.90.009	Poultry Fat - inedible	11.5	7
1502.00.90.000	Fats of bovine, sheep and goats	3.2	16
1511	Palm Oil and it's fractions, not chemically modified:		
1511.10	Crude oil:		
1511.10.10	Crude oil for technical or industrial use	free	16
1511.10.90	Other crude oils	3.8	16
1511.90	Refined oils:		
1511.90.11	Refined oils, solid fractions, <= 1kg	12.8	16
1511.90.19	Refined oils, solid fractions, > 1kg	12.8	16
1511.90.91	Refined oils, other, for tech./ind.l use	5.1	16
1511.90.99	Refined oils, other, not for tech./ind. use	9.0	16
1518.00	Anml/Veg. Fats and Oils:		
1518.00.10	Linoxyn	7.7	16
1518.00.31	Fixed veg. oils, fluid, mixed, for techn./ind. use, crude	3.2	16
1518.00.39	Fixed veg. oils, fluid, mixed, for techn./ind. use, refined	5.1	16
1518.00.91	Animal and vegetable fats and oil and their fraction, treated	7.7	16
1518.00.95	Other: Inedible mixtures or prep. animal	2.0	16
1518.00.99	Other: Edible mixtures or prep. animal	7.7	16
2301.10	Meat and Bone Meal	free	7
2301.20	Fish Meal	free	7

* Value Added Tax.

Source: Official Journal of the European Communities, L278, German Customs Offices.

Table 39: Compound Feed Producers (in 1,000, 250 MT to over 300,000 MT annual production)

1,000MT	**0.25-5**	**5-10**	**10-50**	**50-100**	**100-200**	**200-300**	**>300**	**Total**
1996/97	235	62	139	48	32	17	8	541
1997/98	225	70	126	49	36	14	6	526

1998/99	212	68	123	54	30	15	8	510

Source: Fachverband der Futtermittelindustrie, Mischfutter-Tabellarium, 2000, table 15.